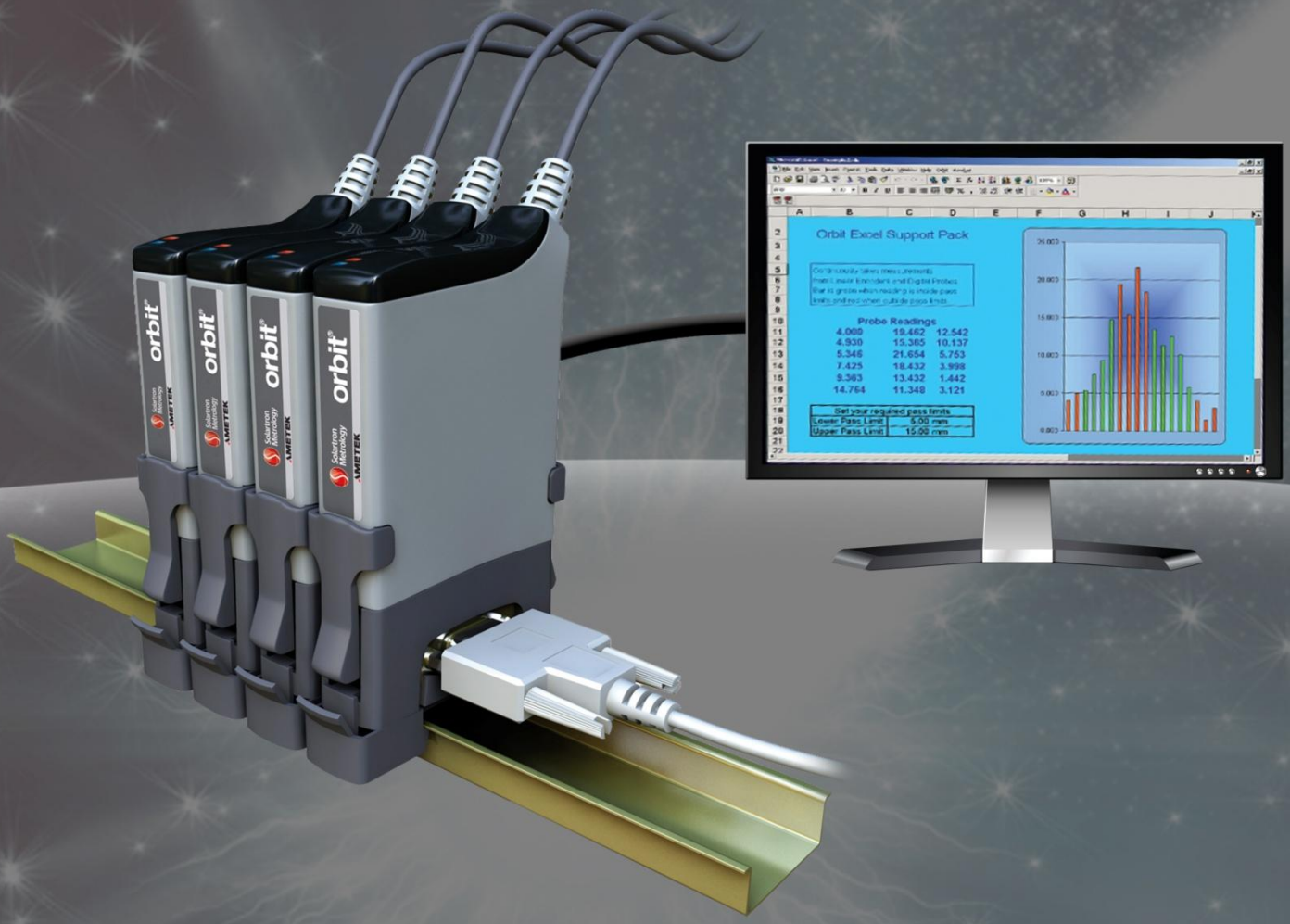
Solartron Metrology

Orbit3 Excel® Add-in User Manual



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503292 - Orbit3 Excel® Add-in

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1. Introduction

The Orbit3 Excel® Add-in enables you to take readings from Orbit Modules forming an Orbit Network and place them in cells of a Microsoft® Excel® spreadsheet.

It is designed to work with standard Solartron Orbit3 Controllers (Orbit USBIM, Orbit RS232IM, WIM and Orbit ETHIM).

1.1. This manual

This manual describes the installation and configuration and also provides information and guidance on using the software.

1.2. Limitations

Important. Please note that this version of the Orbit3 Excel Add-in will only work with Office 2007 onwards. Please see the Windows OS and Office compatibility for more details.

Also, the add-in is only designed to work with the main Orbit3 products. Please see the Orbit Modules & Orbit Controllers compatibility sections for details.

2. Documentation cross reference

520439	Orbit3 Support pack for Windows: *Contains both software and manuals for the Orbit system*
502990	Orbit3 System manual: *Contains Orbit 3 system hardware information*

3. Glossary

Terms used in this manual:

Add-In	Components that can be installed on your computer to add commands and functions to Microsoft Excel
Spreadsheet Configuration dialogue box	Allows you to change how and where the readings are placed in the Excel worksheet
Orbit module	Any device which connects to the Orbit Network and communicates using the Orbit Network protocol
Orbit module ID	Each Orbit Module has a unique 10-character ID to identify it on the Orbit Network
Orbit Network controller	A device that can communicate with Orbit modules using the Orbit Network protocol. Current Orbit Network controllers are: • Orbit USB Interface Module - single channel module for any device with a USB port • Orbit RS232 Interface Module - single channel module for any device with an RS232 port. • Orbit Ethernet Interface Module - single channel module for any device with an Ethernet port
Orbit Network Configuration dialogue Box	Allows addition and removal of modules on the Orbit Network

4. Installation

4.1. PC System Requirements

4.1.1. PC Hardware Requirements

- Personal computer with a processor running at 1GHz or faster with 2GB or more RAM.
- An available USB, COM or Ethernet port.

4.1.2. PC Software Requirements

- Microsoft Windows® operating system (Windows® XP, or later)
- Microsoft® Excel® 2007 or later.
  - See the Windows OS and Office compatibility section for more details.
- Solartron Orbit3 Support Pack For Windows.

4.2. Overview

This section will guide you through the steps required to complete a successful installation of the Orbit3 Excel® add-in.

Install the Orbit3 Support Pack for Windows® software
See later section for details.

⇩

Install the Orbit3 Excel® Add-in

⇩

Install the Orbit controller(s)

⇩

Connect the Orbit module(s)

⇩

Configure & run the Orbit3 Excel® Add-in

4.3. Installing the Orbit3 Support Pack for Windows® software

Important! *Please ensure that you have Administrative access rights for installing this software.*

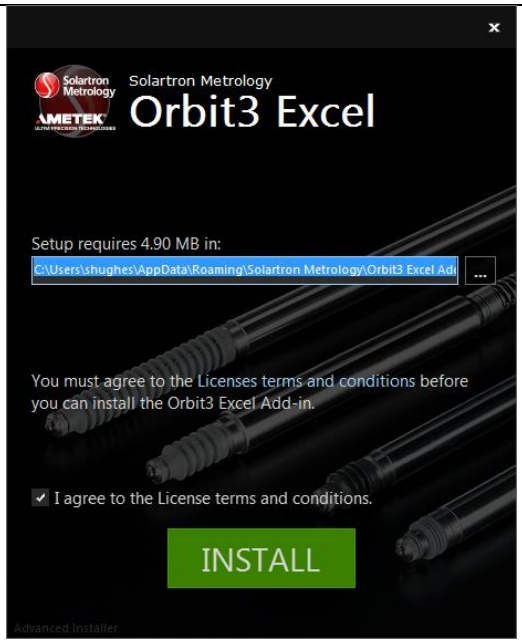
Before you can use the Orbit3 Excel® Add-in, you must have the Orbit3 Support Pack for Windows® software installed on your computer; this is freely available from the Solartron website (http://www.solartronmetrology.com).

If required, refer to the Orbit3 System Manual for Orbit3 Support Pack for Windows® (ORBIT CONTROLLER INSTALLATION AND USE section) for more details on installing the support pack.

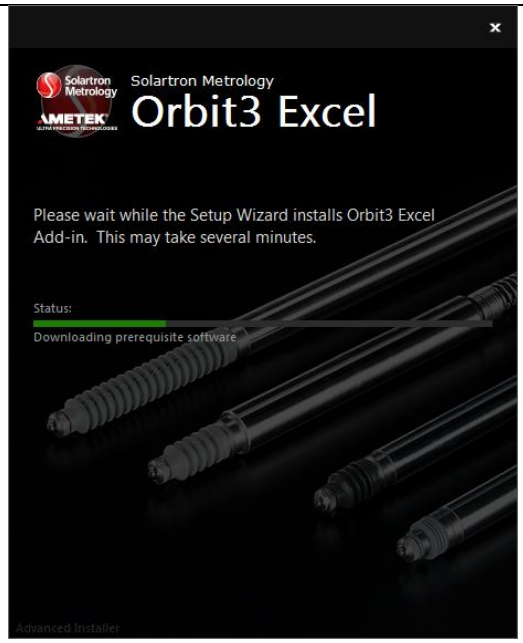
4.4. Installing the Orbit3 Excel® Add-in

- **Important**!
  - Ensure that you have Administrative access rights for installing this add-in.
  - The Add-In is installed on a 'Per User' basis. This means that for each *user login*, a separate install of the Orbit3 Excel® Add-in will be required

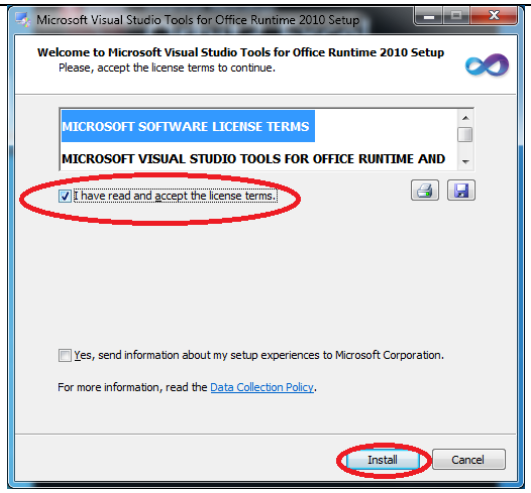
- The Add-in is supplied as a Windows install.
  - To install the add-in, simply run (double click) the file: "setup.exe" and follow the instructions, next.


Solartron Metrology
Orbit3 Excel
Setup requires 4.90 MB in:
C:\Users\shughes\AppData\Roaming\Solartron Metrology\Orbit3 Excel Ad
...
You must agree to the Licenses terms and conditions before you can install the Orbit3 Excel Add-in.
I agree to the License terms and conditions.
INSTALL
Advanced Installer

1) Click "INSTALL" to start.

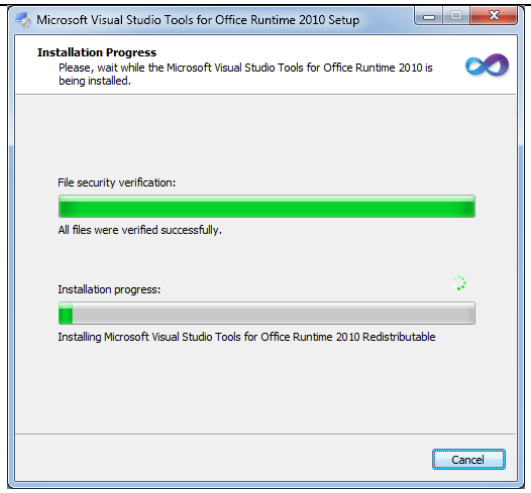

Solartron Metrology
Orbit3 Excel
Please wait while the Setup Wizard installs Orbit3 Excel Add-in. This may take several minutes.
Status:
Downloading prerequisite software
Advanced Installer

2) Any pre-requisite software required by the Add-in (if not already existing) is automatically downloaded & installed (e.g. Microsoft Visual Studio Tools for Office Runtime 2010). If nothing is required, proceed to step 6)


Microsoft Visual Studio Tools for Office Runtime 2010 Setup
Welcome to Microsoft Visual Studio Tools for Office Runtime 2010 Setup
Please, accept the license terms to continue.
MICROSOFT SOFTWARE LICENSE TERMS
MICROSOFT VISUAL STUDIO TOOLS FOR OFFICE RUNTIME AND
I have read and accept the license terms.
Yes, send information about my setup experiences to Microsoft Corporation.
For more information, read the Data Collection Policy.
Install
Cancel

Microsoft Visual Studio Tools for Office Runtime 2010

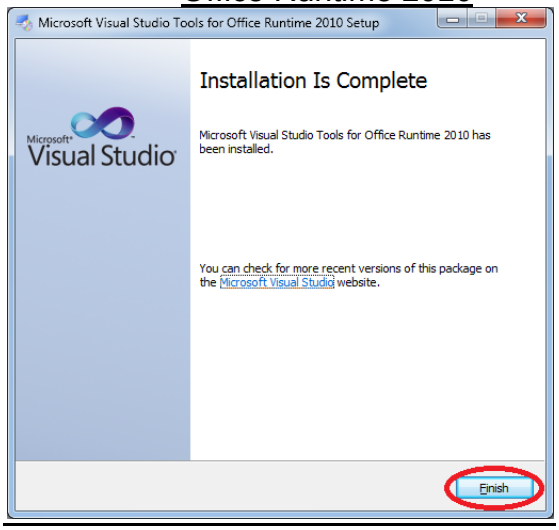
3) After downloading, agree to install


Microsoft Visual Studio Tools for Office Runtime 2010 Setup
Installation Progress
Please, wait while the Microsoft Visual Studio Tools for Office Runtime 2010 is being installed.
File security verification:
All files were verified successfully.
Installation progress:
Installing Microsoft Visual Studio Tools for Office Runtime 2010 Redistributable
Cancel

Microsoft Visual Studio Tools for Office Runtime 2010

4) The install progress is shown as above.

Microsoft Visual Studio Tools for Office Runtime 2010

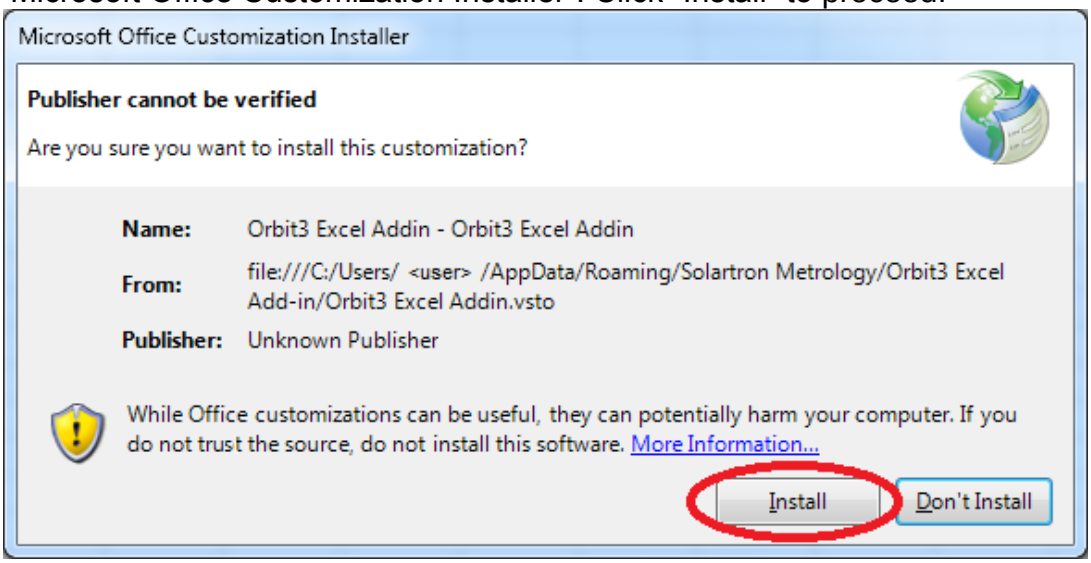

Microsoft Visual Studio Tools for Office Runtime 2010 Setup
Installation Is Complete
Microsoft Visual Studio Tools for Office Runtime 2010 has been installed.
You can check for more recent versions of this package on the Microsoft Visual Studio website.
Finish

5) Click “Finish” to complete

6) Click “Finish” to complete

Launching Excel

- The first time that Excel is opened after installation has completed will bring up the “Microsoft Office Customization Installer”. Click “Install” to proceed.


Microsoft Office Customization Installer
Publisher cannot be verified
Are you sure you want to install this customization?
Name: Orbit3 Excel Addin - Orbit3 Excel Addin
From: file:///C:/Users/ <user> /AppData/Roaming/Solartron Metrology/Orbit3 Excel Add-in/Orbit3 Excel Addin.vsto
Publisher: Unknown Publisher
While Office customizations can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. More Information...
Install
Don't Install

Note that this only happens on the first time that the current user launches Excel.

- The software has now been loaded as an Excel Add-in. This can be accessed via the Orbit menu buttons on the Excel Add-Ins Menu tab.

- This will install this Orbit3 for Excel manual and associated example spreadsheets to the current user’s “My Documents” area. Shortcuts are provided in the start menu in folder: “Orbit3 Excel Add-in”.

- After the Orbit3 Support Pack for Windows® and Orbit3 Excel® Add-in have been successfully installed by an Administrator, a standard user may install the Add-in for their own use, however Administrator access rights will be required if Excel® requires any additional updates.

4.5. Installing the Orbit controller

The desired Orbit controller (e.g. USBIM) needs to be connected to the host PC. For details on this, please refer to the Orbit3 System Manual (502990).

4.6. Connecting the Orbit Network

Connect the modules that will form the Orbit Network to the Orbit controller. The connection depends on the type of Orbit Controller used. Please refer to the Orbit3 System Manual (502990).

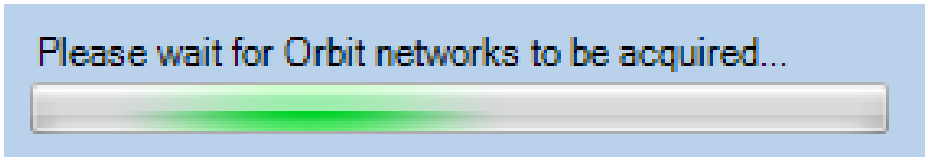
4.7. Configuring the Orbit3 Excel® Add-in

- Open Excel
- Select **AddIns** from the Excel toolbar.
  - The Orbit3 Add-in should be visible as:
  -

- In order to start using the add-in, it should be Connected – see Connecting to Orbit.
- Note the 'Find WIMs' checkbox that should be checked to enable searching for WIM controllers when 'Connect' is pressed.

4.7.1. Connecting to Orbit

Before editing settings and taking readings are allowed, the "Connect" button should be clicked. This will connect to available Orbit networks.
Whilst connecting, the following dialogue is displayed:



After connecting the button changes to "Disconnect".

Before taking readings is allowed, configuration settings need to be in place. See the Edit Settings section of the tool bar Buttons description for more details.

4.7.1.1.Tool Bar Buttons explained

The tool bar displays the following buttons:

- Disconnect
  - This button disconnects from the Orbit networks (previously connected). Note this occurs automatically when the Add-in / Excel exits.

- About
  - Displays an About Box with the program version.

- Settings
  - Displays the configuration dialogue box (see Edit Settings).

- Take Readings
  - Starts reading Orbit modules (see Taking Readings)

- Zero
  - This button can be used to set the current reading(s) to zero. All subsequent readings will be referenced to this zero datum. This action cannot be undone.

- Reset
  - Clicking the Reset button will set the current destination cell address to the initial cell address that was set via the Configuration dialogue box. Also resets the number of readings taken to zero.

- Find WIMs
  - Enables searching for WIM controllers when ‘Connect’ is pressed.
    This is by default not checked as the connect time for WIMs is slower than for other Orbit3 controllers.

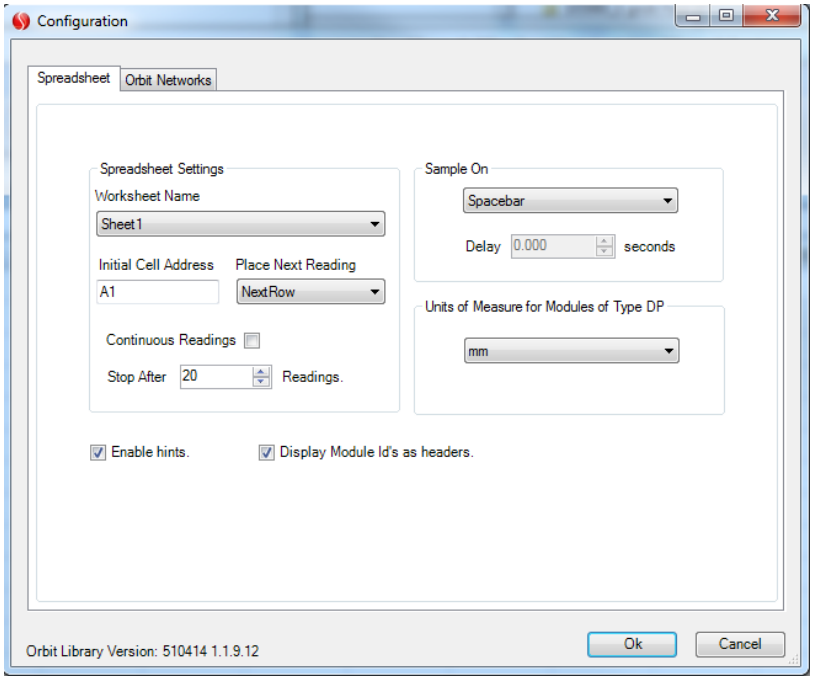
4.7.2. Editing Orbit Settings

When **Settings** is selected, the *Configuration* dialogue box opens. This dialogue box has two tabs:

- The Spreadsheet tab; configures how and where readings are placed in the Excel worksheet.
- The Orbit Networks tab; configures which Orbit controller and Modules are to be used

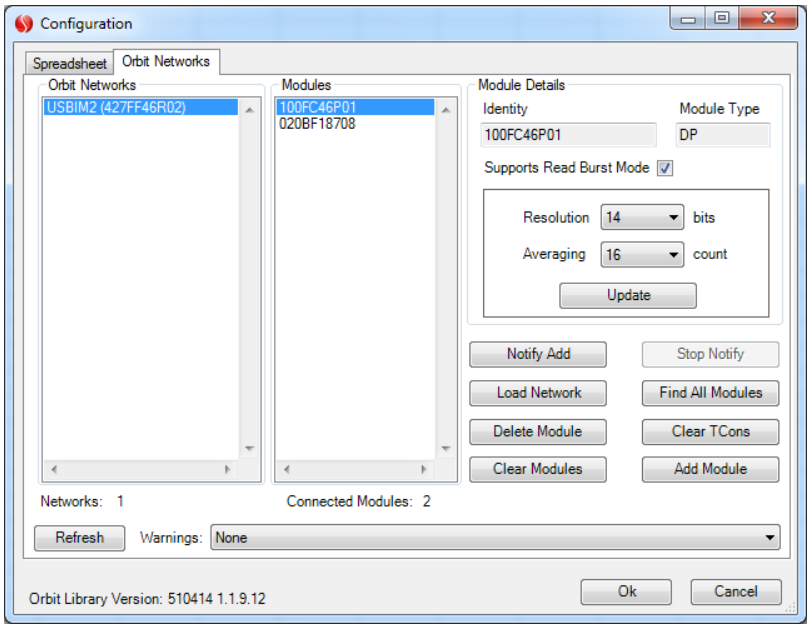
The Configuration Settings are saved with the workbook. Ensure you save the workbook to preserve your current setup.

4.7.2.1.Spreadsheet Configuration



Worksheet Name	Lists the names of the available worksheets in the active workbook. Use this control to select the destination worksheet for your Orbit readings		
Initial Cell Address	Sets the cell in which the first of the Orbit readings is to be placed. The address can be in A1, A1 or 'Name'		
Place next reading	Use this control to select where subsequent readings will be placed. The choices are next row, next column, same row or same column		
Stop after X readings	Sets the number of readings to take before automatically stopping taking readings		
Continuous Readings	Use this control to take readings until requested to stop.		
Units	Sets the unit of measure for all the Orbit readings placed on the spreadsheet		
Sample On	Selects the event that triggers Orbit readings.	SPACEBAR	Using keyboard functions
		ENTER	
		ENTER (num-pad)	
		TIMER	Automatically using the PC system timer
Delay (seconds)	Sets the delay (in seconds e.g. 1.234) between subsequent readings when **Sample On** is set to **TIMER**.		
Enable Hints	Use this to choose whether *tool tips* are shown when hovering over control items.		
Display Module Id's as headers	Enables the recording of the Orbit module ID numbers along with their readings		

4.7.2.2.Orbit Network Configuration



This dialogue box allows you to add and remove Orbit modules on an Orbit Network. The modules in this list are the modules that will be read from Excel (in the same order as they appear on the list). Refer to the Orbit System manual for more details on configuring an Orbit network.

- Select the Orbit Network you wish to use from the Orbit Networks list.
- Add the Orbit modules that you wish to use by using one of the following buttons:

Button	Function
Notify Add	This adds the module whose probe reading changes (e.g. by moving the tip of a Digital Probe). Click “Stop Notify” to halt this process.
Find All Modules	This automatically polls the Orbit Network and adds any modules detected.
Add Module	This adds an individual Orbit module by its identity.
Load Network	This finds any modules stored in a previous configuration (stored in ‘hotswap’ T-Con memory).
Delete Module	This deletes the selected module from the Module list.
Clear Modules	This clears all modules from the Module list.
Clear TCons	Clears the ‘hotswap’ T-Con memory.
Resolution	Select the module’s resolution (applies to Digital Probes, AIMs and LT/LTH lasers only).
Averaging	Select the module’s averaging (applies to Digital Probes, AIMs and LT/LTH lasers only).

Note that the order of modules can be changed using ‘*drag and drop*’.

5. Using the Orbit3 Excel® Add-in

5.1. Guidelines

- The Add-In uses the Orbit Library, which (by design) can only be used by one application at a time. Thus two spreadsheets are not allowed to operate at the same time.
- Configuration settings for the add-in are stored in the spreadsheet, so it is not recommended to have two spreadsheets open at the same time; otherwise, settings may be taken from the wrong spreadsheet.
- The Add-In uses a hidden sheet in the spreadsheet to store configuration settings. Therefore, if the 'Show sheet tabs' option is unchecked (in 'Excel Options/Advanced/Display options for this workbook') - thereby hiding the tabbed pages, the add-in will not function correctly. The solution is to ensure that the work sheet tabs are always visible.

5.2. Taking Readings

- Once the configuration settings have been chosen, select the 'Take Readings' button on the tool bar to start receiving readings from modules on the Orbit Network. The reading will be taken according to the configuration settings requested.
- Click "Stop Readings" to stop, once already started.
    - Note: If Sample on has been set to TIMER, this button will start the timer.

5.3. Disabling/Enabling the Orbit3 Excel® Add-in

If no longer required, the Orbit3 Add-in may be disabled.

To disable the Orbit3 Add-In & remove the Orbit menu from the Excel toolbar: In Excel, select ***Excel Options, Add-Ins, Manage COM Add-ins*** *& uncheck the* ***Orbit3 Excel Addin*** *check box.*

To enable the Orbit3 Add-In and add the Orbit menu (having disabled it from the
Excel toolbar): In Excel, select ***Excel Options, Add-Ins, Manage COM Add-ins*** *& check the* ***Orbit3 Excel Addin*** *check box.*

6. Examples

The Orbit3 Excel Add-in install contains examples to help you get started. These examples are designed to show different aspects of the Add-In.
After loading the example you will need to set-up the Orbit module(s) (refer to Orbit Network configuration).

Example 1
• Takes 5 readings from an Orbit module. A new reading is taken each time the spacebar is pressed. • The individual readings are displayed in a table, together with the mean. The reading values are also displayed on a bar graph.
Example 2
• Automatically takes readings from any two Orbit modules every second. • The readings are then placed in a worksheet called ‘Reading’, and a two column graph is shown on a worksheet called ‘Graph’.
Example 3
• Automatically takes continuous readings from an Orbit module. • The reading is placed in a cell in the worksheet. The Limits table allows you to enter your upper and lower limits. The graph shows a simple column display that changes colour (from red to green) when the reading is within limits.
Example 4
• A copy of the functionality of Example 1, with an added VBA macro button to save results. Note that this example is saved as a macro enabled workbook (.xlsm). • The macro stores results to the MyDocuments area as a text file (Example4.txt) • The macro code can be viewed in the Visual Basic editor. • The visual basic editor is an integral part of Excel in the ‘developer’ tab. This tab needs to be enabled via a check box in ‘Excel Options’. • Note that because this spreadsheet uses macros, Excel may need its macro security changed.

7. Compatibility

7.1. Windows OS and Office Versions

This table details which versions of Windows and Excel work with the Orbit3 Excel Add-in.

Windows OS Version	Office 2003[1]	Office 2007	Office 2010	Office 2013
Windows 7, 32-bit	✘	✓	✓	✓
Windows 7, 64-bit	✘	✓	✓	✓
Windows 8.x, 32-bit	✘	✓	✓	✓
Windows 8.x, 64-bit	✘	✓	✓	✓
Windows 10, 32-bit	✘	✓	✓	✓
Windows 10, 64-bit	✘	✓	✓	✓
Windows XP, 32-bit	✘	✓	✓	✘[3]
Windows XP, 64-bit	✘	✓	✓	✘[3]
Windows Vista, 32-bit	✘	✓	✓[2]	✘[3]
Windows Vista, 64-bit	✘	✓	✓[2]	✘[3]

1. Microsoft support for Office 2003 ended April 8th 2014
2. Vista requires minimum of Service Pack 1 for Office 2010
3. Office 2013 not supported on this Operating System

7.2. Orbit Modules

This table details which Orbit Module Types work (and their associated functionality) with the Orbit3 Excel Add-in.

Module	Reading	Zeroing	Extra Functionality[1]	Not implemented Functionality[2]
Digital Probe	✓	✓	Resolution & Averaging	-
Orbit LT Lasers	✓	✓	Resolution & Averaging	Laser Beam off/on
Orbit LTH Lasers	✓	✓	Resolution & Averaging	Laser Beam off/on, Low pass filter[3], Level cut time[3]
Linear Encoder (LE)	✓	✓	-	Preset, Reference Mark
Digital Input Output Module (DIOM)	✓	✘	-	Preset
Digimatic Input Module (DIM)	✓	✘	-	ReadOnSwitch, ReadOnSample Read Modes
Encoder Input Module (EIM)	✓	✘	-	RefAction, Quadrature and Encoder Modes
AIM (Voltage / Current)	✓	✘	Resolution & Averaging	-
AIM (PT100)	✓	✘	Resolution & Averaging	-

1 This column details the modes / functionality of this Orbit Module type that **are** available via the Excel Add-in.
2 This column details the modes / functionality of this Orbit Module type that are **not** available via the Excel Add-in.
3 These settings for the LTH type lasers can be set via OrbitLibraryTest software (part of the Orbit3 Support Pack for Windows). Note that these settings are non-volatile (i.e. still retained after a power off/on cycle).

7.3. Orbit Controllers

This table details which Orbit3 Controllers work with the Orbit3 Excel Add-in.

Controller	Compatibility with Excel Add-in
USBIM	✓
RS232IM	✓
ETHIM	✓
WIM	✘

8. Differences between the Orbit3 and original Orbit Excel Add-ins

8.1. Introduction

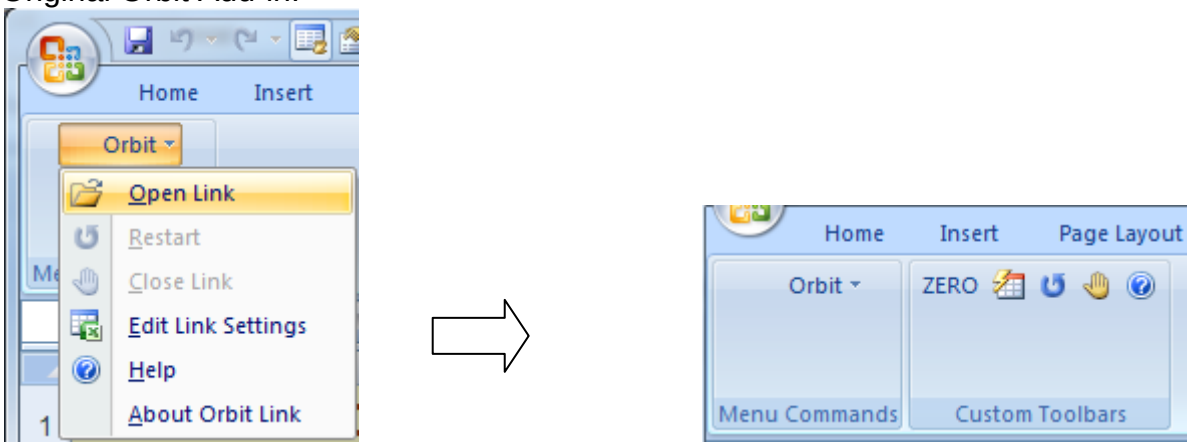
This section is only relevant for users familiar with the original Orbit Excel Add-in. It details a list of the differences between the two versions.

At its core, the Orbit3 Add-in uses the Orbit Library, rather than the legacy (no longer supported) Orbit dll that is used by the original Orbit Add-in.

8.2. User interface

The user interface has changed considerably. The older add-in used a two-stage tool-bar menu system:

Original Orbit Add-in:



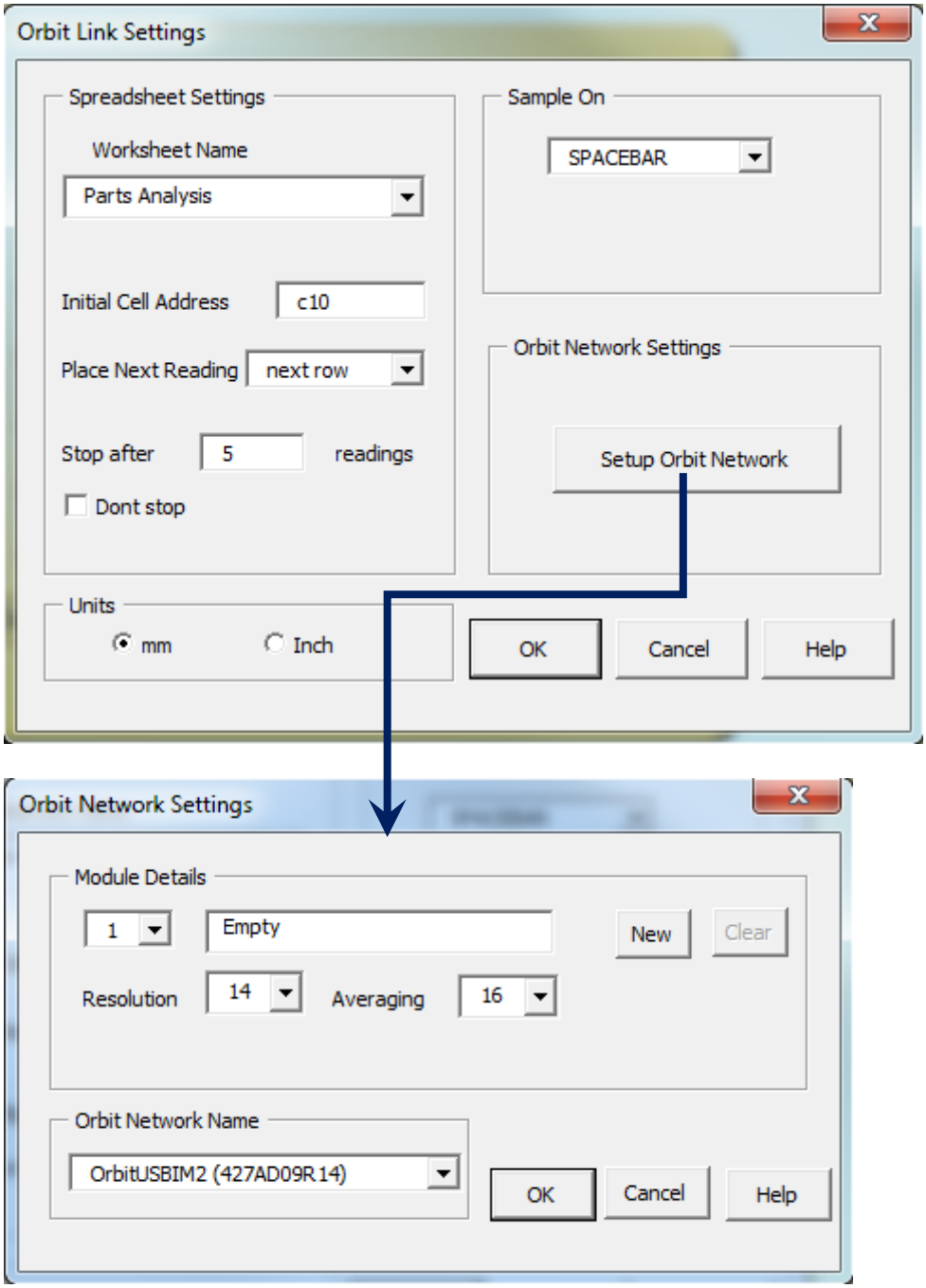
The Orbit3 version has one menu:

The functionality is the same but we no longer have the concept of a ‘Link’. The user clicks on the Connect button which causes the application to search for available Orbit networks and modules.
The new add-in no longer has a help button. Where required there are hints that appear when the mouse is moved over an item.

8.3. Changing settings

Both versions of the Excel add-in have similar Windows dialogs for making configuration changes:

8.3.1. Original Excel Add-in



8.3.2. Orbit3 Excel Add-in

The new Excel Add-in uses tabbed pages to switch between spreadsheet and Orbit network configuration settings (as detailed in the Configuration section)

Whereas the Excel Spreadsheet settings screen is very similar to the older Excel add-in, the Orbit Networks settings screen offers an easier view of all available Orbit networks and the modules on each of them. This information is displayed within two adjacent list boxes that resize with the window. Additionally, there exists a splitter bar between the two lists allowing the user to adjust the width of both to suit the contents.

New functionality added here:

- When a module is added to an Orbit network, its type is displayed in the Module Type box that also updates to reflect the module type of the currently selected module from the module list.
- A tick box indicates if the selected module supports Read Burst mode.
- Read Burst mode is now supported and will be used by default unless one or more modules on a network don't support it, in which case this Excel add-in will revert to a more compatible Read method.
- A drop-down box has been added where waning messages may be displayed. Warnings will typically be an indication that a certain mode of operation such as Read Burst mode is not supported by one or more modules on a specific Orbit network. With no issues the word "None" will be displayed. The first warning in the list will be displayed; others may be viewed by clicking on the down arrow.
- 'Find All Modules', 'Load Network', 'Clear TCons' and 'Add Module' buttons have been added to perform the specified actions.
- To change the order of modules on a network a drag and drop mechanism has been implemented. First click anywhere within the Module list and then click and hold the left mouse button on the module to be moved. All the time the mouse button is pressed, the selected item may be dragged to the desired position in the list. Releasing the mouse button will perform the actual move - provided that the mouse pointer is within the module list. Note: Pressing the *Escape* key will cancel the drag and drop operation.
- The Update button, when clicked will write the 'Resolution' and 'Averaging' values (selected by using the two drop-down boxes) to the currently selected module. As per the older add-in, these values are stored in the worksheet settings and are re-applied when this is re-opened (after being saved). The currently selected module's resolution and averaging values are selected and displayed in the respective drop-down boxes.
- The counts of both the available Networks and the modules connected to these networks are displayed underneath the respective lists. Any configured modules not found (i.e., not plugged in) are marked as "unavailable" and do not contribute to the connected count.

- The Delete Module button allows the user to remove the selected module from the currently selected Orbit network. This matches the functionality of the Clear button in the older add-in, but has a more descriptive label to differentiate it from the Clear Modules button described next. As per the older add-in, the user may undo this delete by clicking on the Cancel button.

- The Clear Modules button prompts the user if they wish to remove all modules from the currently selected Orbit network. As per the older add-in, the user may undo this delete by clicking on the Cancel button.

- The Refresh button will update the list of modules to reflect the current status. This is useful if modules are either connected to Orbit networks or disconnected from them whilst within this settings dialog window. For example, modules unplugged whilst in this dialog window will have their descriptions updated with the word “unavailable” after this Refresh button has been pressed. Closing the Configuration dialog window and re-opening it will have the same effect.

- It is now possible to display the Orbit Module Ids as headers of the reading rows/columns.

- For informational purposes, the version of the software Orbit Library being used is displayed at the bottom left of the dialog window.

The new add-in has a set of buttons much the same as the older Excel add-in:

The main difference is that they have a textual description and the Connect button acts as a toggle to switch between connect and disconnect.

8.4. Other improvements/differences

- If the computer’s system clock supports it, the resolution will be set to one millisecond. The default setting is five milliseconds. If the clock’s resolution is set to one millisecond this will allow it to more accurately achieve the timing interval set for timed readings of modules.

- If the user is editing a spreadsheet cell i.e., the cell is in edit mode, this prevents any of the add-in buttons for the old Excel add-in from responding. The new add-in will take the cell out of edit mode and respond to the button press.

- Handling of Orbit networks (e.g. USBIM’s) either not plugged in or identified by the computer is handled differently with the new add-in. The old add-in can crash under certain conditions such as clicking on the Ok button instead of the Cancel button, and if no networks are connected it can just crash altogether. The new add-in will display a list of missing networks and give the user the option to remove them from the

configuration if they are no longer required. Missing network modules not removed from the configuration will be marked as “unavailable” in the network list.

- Option to connect to WIM Orbit controllers included.
- The 31 module limit per network does not apply to the new add-in.
- The new add-in does not display error codes for faulting module conditions. Instead, textual descriptions of the issues are displayed in the cell where a module’s reading would have been placed.
- The new Excel Add-in does not use the VBA project object model. This means there are no requirements to set macro settings in Excel’s Trust Center or to save workbooks as Excel Macro-Enabled (*.xlsm) files.
- Creating a chart on a separate Excel tabbed page by selecting a range of worksheet values and pressing the F11 key causes the legacy VBA add-in to close. The new add-in works as expected.

9. Revision History

REVISION	DATE	COMMENTS
1	10/07/15	Initial issue
2	23/07/15	Orbit Modules & Orbit Controllers Compatibility tables added.
3	04/08/15	Added Documentation cross reference, WIM controller connection and updated Installing the Orbit3 Excel® Add-in section